

Final report

Capacity building in resource mobilization

Centre File no: 102564-017

Contract no: 109552

Introduction

Fahamu was contracted by IDRC in March 2005 to assist in the building of “capacity in resource mobilization for GEH partner institutions with a view to building a more diverse and stable funding base for their research.”

To this end, we were required to:

1. Design and conduct a training workshop that will meet the needs expressed by the participants
2. Facilitate the exchange of experience and information on resource mobilization among participating institutions
3. Complement the training by appropriate pre-workshop and follow up activities with participating research institutions.

Further details of the Terms of Reference for this consultancy are provided in Appendix 1.

Methodology

Fahamu was required to work in close cooperation with IDRC’s Partnership and Business Development Division (PBDD) in the implementation of this project.

Training needs assessment

PBDD supplied Fahamu with contact details of relevant individuals in each of the institutions internationally who were to be the target of the capacity building exercise. Fahamu developed a questionnaire to be administered to assess training needs which was discussed with PBDD and amended according to suggestions. The questionnaire was then translated into French, and all participants were sent a copy by email for their information. The questionnaire was completed in most cases through telephone interviews, although a few individuals submitted written answers. Wherever possible, however, even those who completed the questionnaire in writing were interviewed on the phone as well. Appendix 2 provides a sample of the questionnaire used.

Design and delivery of Training Workshop

A detailed workshop plan with objectives for each session was developed and submitted for approval by PBDD, based on an existing course developed by Fahamu in Association with the University of Oxford Department for Continuing Education in 2003 (Adilisha: strengthening human rights and advocacy organizations). Copies of the plan were provided to all participants prior to the workshop. Each participant was also provided with the following:

- A course pack with a CDROM
- One page summary of the course outline
- A 6-page summary of the course plan including a diary of events and summary of objectives for each part of the course

(Copies of these documents are provided in Appendix 3: copies of the CDROM have already been submitted to PBDD). Copies of these documents were sent to PBDD for approval.

The workshop was held in Sali, Senegal at a venue arranged by IDRC. Although the original consultancy agreement was for a 2-day workshop, in the event, allowance was made by the workshop organisers for only 1.5 days. Participants at the workshop were originally supposed to be limited to those whom PBDD had enrolled, several others attending parallel workshops also attended the workshop. The workshop was facilitated by Firoze Manji and Patrice Vahard.

Evaluation forms were completed by all participants attending the workshop. The evaluation form is also included in Appendix 3.

Providing follow-up advice and follow up

All participants were enrolled on a listserve specifically established for this purpose. Participants were offered the choice of either following the course developed on the CDROM (Fundraising and resource mobilisation) or to engage with dialogue with Fahamu in the development of fundraising strategies or proposals, developing plans for financial sustainability, and discussions with others about their own experiences.

In addition, Fahamu communicated with each participant individually to offer support and guidance on issues identified by them or developed through their work with the CDROM.

Results

Training needs assessment

Only 11 participants completed the needs assessment questionnaire, 8 males

and 3 females. What percentage of the participant group does this represent?

The participants comprised a wide range of professionals, including professors, one vice-chancellor, heads of departments, researchers and one project manager in a non-academic institution. Most had held their current jobs for between 3-5 years, although the range was from 6 months to 20 years.

The countries covered by their respective institutions included: Benin, Burkina Faso, Columbia, Georgia, Kenya, Mali, Mexico, Senegal, South Africa, South Africa and Zimbabwe. One institution in Senegal and one in South Africa had a sub-regional, rather than national focus alone.

The reasons for wanting to participate in the training were fairly predictable: the need to raise funds, strengthening skills, and develop more experience. The need to identify potential funders and to tap new sources of funds was fairly universal, as was the need to develop means for raising core funding. But above all, most wanted to learn 'how to write winning proposals'. Does it differ from the needs of those who sign up for the on-line course?

All indicated that there were one or more other people in their institutions who would want to participate in any training offered by the project.

The greatest difficulties that they reported as having was knowledge of fundraising techniques, dependency on federal or government funding alone (that was shrinking), and the recognition of the highly competitive environment for fundraising as donor funding was reduced. Amongst francophone countries in Africa, there was a common thread of lack of adequate knowledge about the sources of funding that was available.

There was considerable diversity in the proportion of their funds coming from international funding agencies, ranging from 25% to 100%. Two institutions were entirely funded from government sources. One institution obtained 90% of its funds from tuition fees, and one raised 10% of its funds from individual donors.

All sought to expand health systems research in their country or region of responsibility, and all wanted to increase the sources and amounts of resources that they needed for this purpose. There was a general recognition of the declining amounts of government funding. Nearly all sought to raise the profile of their respective organisations, but few mentioned any changes to health status that they wanted to achieve in the populations with whom they worked.

Four of the institutions raised money from corporations, one from trade unions. The remainder six had not raised or approached any corporation for support.

All but one held regular or occasional public events, including seminars and workshops and general discussion forums. Only one had held a public

fundraising event.

None had a dedicated fundraiser, and mostly depended on the Director or senior person to do the fundraising. Three institutions claimed that 'everyone was involved' in fundraising.

Only one had previously attended a course in fundraising – and he had a Diploma in Advanced Business Communications, and in Practical and Strategic Fundraising.

Only one claimed to have a strategic fundraising plan, and two had an organisational plan without information about where the funds were likely to come from.

Except for those institutions that were government funded, salaries were sources mainly from grants.

Most had had some level of success in raising grants through writing proposals, with two not having written a proposal before, and one who had not yet been successful in raising funds.

About half the institutions claimed that they had invited a funder to visit their institution during the previous 12 months, and three apparently had never done so. Only 4 did this regularly.

In summary: Although based on a rather small sample of respondents, the picture to emerge is one of a not inexperienced group, but one feeling that they could be doing much more. There was considerable anxiety about the decline in funds availability and in the level of competition. The participants from the Francophone countries were the least experienced of them all in fundraising, their funds tending to come from government sources, and the degree of uncertainty about the future being considerable. Knowledge or experience of raising funds from sources other than international agencies was limited, and almost no experience (except for one institution) in public fund raising. We had insufficient information from the interviews to judge whether their institutional fundraising strategies were adequate for sustainability, but their performance at the workshop suggested that this was an area which all needed to focus their attention.

Workshop training

The workshop plan was, in the best of circumstances, ambitious, but do-able. However, two factors prevented us from covering all the ground that we had anticipated: first, the length of the workshop was reduced by half a day, putting considerable pressure on both participants and facilitators alike. Secondly, there were no provisions for simultaneous translations. The latter problem was

exacerbated by the fact that as the workshop progressed, it became apparent that the fundraising experience of those from francophone countries was substantially lower than amongst those from Anglophone countries. This suggested that a separate workshop for Francophone countries might be appropriate in future.

Nevertheless, there was considerable engagement by participants in the topics covered, with much humour and animation. More time would have allowed greater use of small group discussions, but we got the impression that much was learned by the participants. The evaluations of the workshop by the participants were uniformly positive, with reservations expressed by the francophonies about the level and the problems of lack of simultaneous translations.

The workshop was slightly complicated by the involvement of many more participants than had originally been planned for, altering the facilitator-participant ratio from the ideal, and creating difficulties because of insufficient number of resource materials being available.

The obvious enthusiasm of the participants during the workshop was not matched, however, by the degree of engagement that occurred in the post workshop phase (see below).

Follow up phase

Participation and discussion on the listserve (geh-resource@fahamu.org) was enthusiastic to start with. All participants were offered the opportunity to follow the Fahamu course on Fundraising and resource mobilisation. 10 participants indicated they would pursue the course. Of these, two were francophone, and presented a problem because of materials were only available in English. Of the 219 messages posted to the list, more than 70% were posted within 2 months of the workshop.

Assignments from the CDROM were submitted by 3 people, and in each case, only the first assignment was completed.

Fahamu contacted each of the participants directly in the immediate post-workshop period to establish what assistance they needed from Fahamu, including support for developing strategies, help with proposal writing or support for doing the assignment on the courses. These emails solicited a positive response from most participants, most of whom indicated that they were under pressure from work, but had every intention of continuing. None of the participants identified a specific project on which they wanted assistance, although there were intentions expressed to do so (that never materialised).

Participants were contacted on three further occasions, about six weeks apart. Although a few responded to say they were still busy but intended to pursue the

course, in practice no further communication was received.

In January 2006, Fahamu wrote to the participants again to find out what had happened. This solicited 6 replies. Two from Francophone participants who had difficulties pursuing the English material and who had not had feedback from the francophone tutor. The remainder all apologised saying that the material was useful but pressures of work too great. The following email captures the spirit of the communications:

Dear Firoze:

Happy and healthy New Year to you and your family also.

Let me tell you that I feel very bad for not having finished the course. As you said in another message "the road to hell is paved with good intentions" and I will add "with excuses".

I have a double reason for not having ended the course:

1. The most important which is my only responsibility. My excess of commitments during the last semester, which included at least two months travelling, among other things.
2. I found the course extremely relevant and useful, but unnecessarily cumbersome because of what I found was excessive level of detail. Could you think of a simpler, more straightforward version?

But, independently of that, I have followed and plan to follow utilizing the CD and the information you provide in it on the community of donors. I am planning to use that information for our next round of fundraising.

I do appreciate your offer and I would certainly consult you in case of need in the near future.

Best regards

Conclusion

In conclusion, this was a disappointing result, especially after the initial enthusiasm expressed at the workshop. It is difficult to draw conclusions from this exercise, especially as there was no requirement for any participant to complete the course. Our own experience has been that whenever participants don't personally have to make a financial contribution to participating in a course, the fall-out rate is considerable. The dying of enthusiasm after the first few weeks

is quite normal and in line with our experiences. Nevertheless, we feel a sense of disappointment that, with IDRC having put so much effort and resources into this initiative, none of the participants were able to take advantage of a unique opportunity to get support in developing their work in the post course period. Nevertheless, the participants have the resource materials that Fahamu has developed and to which they can refer. And we believe that they benefited (albeit to varying degrees) from the workshop in Senegal.

Additional comments

1. How best to address the needs (and constraints) of IDRC research partners in the future?

Our experience from similar courses run over the last 3 years is that retention rate (i.e. those completing the course) is always lowest when participants have no obligation to contribute to the cost of a course, and highest when their participation is partly or fully funded by themselves (even if the actual amount that participants contribute is relatively small). In the present project, none of the participants had any obligation to contribute, and thus they would be no worse off if they completed the course or not. Indeed, completing the course – or taking advantage of the mentoring support that was on offer – required a considerable input on their own part, with no immediate returns. They had nothing to lose from not participating. Should IDRC consider insisting that participants contribute towards the cost of a training/capacity building programme?

All of the participants on the course were researchers – health research is their primary responsibility. The demands on their time on a day-to-day basis precludes most of them from engaging in fundraising in any strategic sense. The exceptions were those who were from non-governmental organisations and those who were senior management of university institutions. In the latter case, for example with regard to Professor Mugambi, the demands of his job are such that he cannot be expected to do the day-to-day work of fundraising. In practice, he delegated this responsibility to two of his colleagues – but the latter had not been able to attend the workshop, so were not entirely sure what was to be expected of them.

Perhaps the most important, and related, weakness of this cohort of participants was the lack of strategic vision about what their institutions were seeing to *achieve* as opposed to *doing*. They could all describe what their institutions were doing, and could express in general terms what their long term goals were (for the betterment of humanity, improvement of the health of the population, etc). But there was not clarity about what their medium or short-term objectives were, nor any clarity about what they should or could be doing to achieve such objectives. This weakness is important because fundraising is not an end, but a means to an end. If the end that they want to achieve is not clear, then fundraising becomes detached from their purpose. To express it another way: my sense is that the

difficulties that IDRC partners have is not so much about how to fundraise but about developing strategic directions, of leading and managing an institution that can make a real difference and that can achieve very specific objectives over a defined period. Perhaps the investment that IDRC needs to make is to build about strategic leadership capabilities rather than just fundraising capabilities?

That said, it was also clear that those from Francophone African countries work in very different environments to their counterparts in Anglophone countries. Their knowledge and comprehension of fundraising methodologies is qualitatively different. It was a shame that this project was run for participants from both regions at the same time. This isn't merely to do with logistical problems such as translation etc, but more importantly to do with the qualitatively different needs of participants from Francophone Africa. Should IDRC consider providing priority capacity building for partners from Francophone Africa?

2. Looking back, did you think the needs assessment was worth it? How did results influence your planning and training materials?

The information garnered in the training needs assessment was of relatively little value. The principle information obtained was in relation to who the participants were and what kind of institutions that they worked in. We suspect that the information about fundraising experience from many of the participants was more to do with what they would like us to believe or what they thought we wanted to hear. The greatest amount of information garnered about the participants came not from the training needs assessment questionnaire, but from the workshop itself, where their real capacities and capabilities were more apparent. The principal difficulty was that it was entirely unclear what the selection criteria were for partners participating in this project. Were they self-selected? I suspect this was indeed the case. Indeed, the number of participants at the workshop gradually increased as others who had registered for other workshop gradually drifted to this workshop!

That said, however, my own view about how we would proceed after the workshop changed qualitatively as a result of the workshop. Whereas I had expected that they would all participate in the conventional Fahamu distance learning programme, after the workshop I realised that mentoring was going to be a much more important dimension of the project. And if that were the case, then one-to-one communications with participants (rather than online discussions) were probably likely to be much more substantial.

3. How do the reasons for participating in the training compare with those given by others who register for the on-line training?

The reasons given for participating in training was very similar to the view expressed by others who have participated in Fahamu's courses. The difference, however, lies in the fact that those who participate have an opportunity of

examining the syllabus in much greater detail prior to registering, and in addition are required to write a two-page motivational letter explaining how they think the course will make a difference to their work.

4. Is distance learning is not appropriate for IDRC research partners? Under which conditions does it work? What is the profile of people who complete the distance-learning courses? What positions do they occupy in their organizations?

There is no in principle reason that distance learning should not be appropriate for IDRC research partners. Those who have participated in Fahamu's distance learning courses are not dissimilar in profile to those involved in the present project. We have had senior management, researchers, directors, governors, state officials, police, consultants, program officers, office managers, journalists, human rights activists, and a wide range of professions.

There are three features that distinguish those who take Fahamu courses with those who participated in the present course. First, they know before hand what the syllabus is that they are registering for, and volunteer to participate themselves. Secondly, even if their contribution is small, each contributes to the cost of the course. And thirdly, we screen applicants to ensure that they are likely to benefit from the course.

That said, we also work with a number of organisations for whom distance learning seems not appropriate mainly because of other pressures and constraints. Over the last year, we have increasingly provided the option of one-week or two-week residential courses for such people.

5. Given your experience in this field, which follow up modalities would have worked best with the profile of participant at the workshop?

Perhaps participants should have been required to come to the workshop with an outline of a specific topic that they wanted to develop a fundraising proposal around and this could have been used as a basis for follow-up mentoring.

That said, however, I do feel that there are more important strategic issues that need to be addressed – see Additional Comments 1 above.

Of the 219 messages posted to the list, 70% were posted within 2 months of the workshop. Would you say then that the window of opportunity to provide support would be up to 2 months after any learning-based event? How does it compare with other groups with whom you have worked?

Certainly, the best window of opportunity is in the first two months – this is consistent with our experiences in other courses. In recognition of this, we schedule to hold workshops approximately 8 weeks after the beginning of a

course.

Acknowledgements

Fahamu would like to thank IDRC for their efforts in seeking to strengthen the capacity of health researchers to mobilise resources for their work and for their support for this initiative. Thanks particularly to Danièle St Pierre and Lisa Burley for their helpful comments and inputs throughout the project.

Appendix 1: Terms of Reference

Scope of Work

Pursuant to this contract, the consultant shall:

- a. Conduct a training needs assessment aimed at capturing the level of experience and needs of GEH workshop participants in terms of RM. It will be important to also identify linkages between the RM training and the broader conference theme and with other capacity building modules that will be offered at the GEH meeting. A Training assessment summary report will be prepared by March 31.
- b. Design and Deliver a Training Workshop on April 29 and 30. The 2-day participatory workshop is intended to meet the needs expressed by participants and will be delivered in both English and French.

The workshop could cover themes such as:

- Fundraising as a management process
- Principles of fundraising and RM
- Various sources, tools and vehicles of funding
- Geographically relevant case studies related to the health sector.

Close consultation with PBDD will be required throughout the design phase to determine the contents, program, resource people, format, tools and approaches. Draft training materials will be submitted for approval by IDRC by April 10.

A final version of the workshop materials and evaluation will be submitted, in hardcopy and electronic format, along with the follow up plan by May 16.

- c. Provide follow up advisory. After the training workshop, the consultant will engage with interested GEH research partner institution over a period of 8 months (until end of December 2005). Follow up activities will be guided by the needs and interests expressed by the partners and discussions with the consultant/tutor

Post workshop activities could include:

- Helping/guiding participating institutions develop and/or implement a fundraising strategy or a proposal for a funder.
- Assisting institutions in meeting their own RM objectives and milestones for improving their financial sustainability and fundraising skills.
- Facilitating exchange of ideas and experiences among participating institutions and experts.

- d. Submit a final report at the end of the post workshop activities, i.e. by January 16, 2006.

Appendix 2: Questionnaire for needs assessment

Introduction

Several Governance, Equity and Health partners have expressed interest in the need to strengthen their resource base. In this context, GEH, in partnership with Partnership and Business Development Division (PBDD) of IDRC, will hold a 2-day workshop on capacity building in resource mobilization (CB-RM). The training activity, which is scheduled for April 29 and 30, fits well with the overall objectives of the conference and will aim at enhancing GEH research partners' resource mobilization skills. It is hoped that this CB-RM activity will complement other activities planned for that week.

We understand that you have asked to participate in this 2-day workshop. As the time available at the workshop is limited, GEH has arranged, in association with Fahamu, to run in addition a programme over the next six months during which you will be able to participate in a learning programme designed to make you and your organisation effective in resource mobilisation and fundraising. Over the six months you will be assigned a mentor who will guide you through the process of developing your skills in effective resource mobilisation.

This purpose of this questionnaire is to elicit responses that will help us customize the 6-month capacity building program in which you have expressed interest. Your responses will assist us in deciding which issues would be best addressed in the upcoming workshop, and which ones could be topics for post-workshop follow up.

Please read through this questionnaire carefully, and answer the questions as completely as you can.

Within the next week, we will call you on the telephone to interview you at a time that is convenient to you.

Please return this questionnaire to response@fahamu.org **after the telephone interview.**

This questionnaire is designed to help YOU. So be open and honest in your answers. What we want to do is to design a programme specifically for you that meets your needs in the actual circumstances in which you work.

If any questions are not clear, don't hesitate to discuss this when we call you on the phone.

Firoze Manji & Patrice Vahard

QUESTIONNAIRE

Name:	Date: Male/Female
Title Position	Length of time in position:
Name of institution/organisation	Country
Email address:	Telephone number (including country code)

<p>1. Please explain why you want to do this 6-month training?</p>	
<p>2. Are there other colleagues in your organisation who might also want to participate in this training programme?</p>	<p>If so, please send us their names and email addresses.</p>
<p>3. Have you discussed your participation in this training programme with your director/line manager?</p>	<p>If no, would you consider discussing this before you attend the workshop?</p>

<p>4. Please list the three most important things you expect to achieve by the end of this 6-month training programme?</p>	<p>1.</p> <p>2.</p> <p>3.</p>
<p>5. List the three greatest difficulties that your organisation currently has in raising resources?</p>	<p>1.</p> <p>2.</p> <p>3.</p>

<p>6. Over the last 3 years, what has been the principle source of your organisation's income?</p> <p>(Please indicate what <i>percent</i> of your organisation's income came from each source)</p>	<p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p> <p>5.</p>
<p>7. What are the most important things your organization wants to achieve in the next five years for which you need resources?</p>	<p>Please indicate where you think such resources will come from.</p>
<p>8. How many individuals (as opposed to corporations) contribute resources to the work of your organization?</p>	<p>Please indicate why you think these people have contributed to your work?</p>
<p>9. How many companies that contribute resources to your work?</p>	<p>Please indicate why you think these companies have contributed to your work?</p>

10. What events do you organise that enable the public to know about your work?	How often do you hold such events?

<p>11. Who is responsible for raising resources in your organisation?</p> <p>Is there one person with primary responsibilities?</p>	
<p>12. What other training on fundraising or resource mobilisation have you participated in during the last three years?</p>	
<p>13. Does your organisation have a strategic fundraising plan in place?</p>	<p>If yes, please describe its principal features:</p>

<p>14. Where do the funds for salaries and running costs come from in your organisation?</p>	<p>State funds:</p> <p>Grant funds:</p> <p>Donations:</p> <p>Corporate sponsorships:</p> <p>Other (please specify)</p>
<p>15. How many fundraising proposals have you written in the last year?</p> <p>How much did you raise as a result?</p>	

<p>16. When was the last time you invited a funder to visit your projects?</p> <p>Do you do this regularly?</p>	
<p>17. Are there specific topics you would like us to cover during this training?</p>	

18. Do you have any other comments?	
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Thank you for your time in completing this questionnaire. Your answers will help us to design a programme that is tailor made for you.

Firoze Manji & Patrice Vahard

Appendix 3: Documents provided to participants

FUNDRAISING AND RESOURCE MOBILISATION WORKSHOP PROGRAMME

Welcome to the start-up workshop for the course on *Fundraising and resource mobilisation*.

We have planned this workshop to enable you to:

- Understand why IDRC-GEH has arranged for this course
- Get to know your course facilitators
- Get to know other participants
- Understand how the course is organised
- Confirm that you have access to the necessary equipment and facilities for participating in the course
- Assess the extent to which course objectives are consistent with your expectations
- Establish a common understanding of the nature of fundraising and resource mobilisation
- Understand how to manage your time during the course
- Understand some of the challenges that may arise in your organisation as a result of doing this course

The proposed timetable for the day is shown on the next page.

We will supply you also with:

- A course pack with a CDROM
- One page summary of the course outline
- A 6-page summary of the course plan including a diary of events and summary of objectives for each part of the course

WORKSHOP TIMETABLE DAY 1

Time	Event	Objective	
08.00 – 08.20	Introduction	Understanding why IDRC-GEH has arranged for this course	IDRC staff
08.20 – 08.40	Introduction: course facilitators	Introductions and review of workshop programme	Firoze Manji and Patrice Vahard
08.40 – 09.30	Getting to know you and your expectations	Getting to know other participants and to learn about each other's expectations	Group work
09.30 – 10.00	Report back	Achieve consensus about what is to be achieved	Reports from groups
10.00 – 10.30	Coffee break		
10.30 – 11.15	How the course is organised	Understanding how the course is organised, testing plans against expectations Confirming that you have access to the necessary equipment and facilities for participating in the course Achieving consensus about the relevance of the course	Discussion led by Firoze
11.15– 12.45	Introduction to fundraising and resource mobilisation	Understanding concepts: Is it money or what? Why do funders give Principles of schmoozing What resources do you need Contrasting raising money with building constituents	Group work and plenary discussions
12.45 – 13.45	Lunch break		
13.45 – 15.00	Proposals – what they really are not	Understanding concepts of POOP Cultivating relationships Art and science of persuasion Practice is writing a one pager	Plenary and group discussions
15.00 – 15.30	Assessing proposals	Practice at developing criteria for evaluation	Group work
15.30 – 16.00	Tea break		
16.00 – 17.00	Understanding funders	Practice assessing applications	Group work
17.00 – 18.00	Getting to grips with jargon	Defining: goals, objectives, purpose, outcome, outputs, activities	Plenary and group work
18.00-18.30	Evaluating the day	Participant evaluation	Group and plenary sessions

WORKSHOP TIMETABLE DAY 2

Time	Event	Objective	
08.00 – 09.30	Identifying resources	Identify types and sources of resources, and ways of finding them	Group work
09.30 – 10.30	Reviewing the course in more details	Familiarise in detail what the course is about	Group work
10.30 – 11.00	Coffee break		
11.00 – 12.00	Managing time	Understanding the problems of managing a distance learning course while still working	Firoze
12.30 – 13.00	Managing your organisation	Assessing the impact of doing the course on others in your organisation; negotiating space	Group and plenary session
13.00 – 13.30	Summary and evaluation	Evaluating the workshop	Plenary

Course outline

In **Institutional fundraising** we will look at ways of getting grants from funding agencies, such as development agencies, foundations, trusts and other institutions, whose main function is to give grants.

Raising funds from these sources is sometimes called ‘institutional fundraising’. It is where many established NGOs get a large part of their funding from.

We’ll look at how to:

- improve your chances of getting support from major funders;
- manage your funder relationships much more effectively;
- prioritise your time and energy, so that you are spending enough on the fundraising to get the funds that you need for your work.

By the end of this module, you will be able to:

- describe your organisation effectively to funders;
- manage your approaches to a limited range of funders;
- produce project proposals that follow a logical structure;
- manage your relationships with funders;
- plan how you will raise funds from funders.

In **Public fundraising**, we look at other ways of mobilising support (and money and other resources), moving beyond seeking grants from institutional funders.

In particular we will discuss how you:

- raise money and support locally;
- develop a fundraising strategy;
- communicate effectively with your supporters;
- earn and save money.

By the end of this module, you will be know how to:

- identify potential sources of support in your area;
- raise funds from your local community;
- organise a fundraising event;
- get support from local companies;
- get support in kind;
- generate income;
- produce a fundraising strategy;
- produce promotional materials;
- manage your relationships with donors.

Course plan

Week	DATES	Chapter title	Assignments	Email discussion points
1		Introduction to fundraising	None	1: Definition of fundraising
1		Institutional fundraising	None	2: Key fundraising problems
1		Understanding your organisation	None	3: My organisation in a paragraph 4: Why we are so special
2		Understanding your funder	1: Understanding your funder	5: Unusual ways of raising funds
3		Making the approach	2: Making the approach	
4		Writing project proposals	3: Preparing a proposal 4: Logical framework	
5		Managing relations with funders	5: Relationships with funders	6: Briefing for meeting with Zawadi Foundation
6		Planning your fundraising	6: Planning your fundraising	
7		Public fundraising	None	
7		Getting started	7a: Fundraising mission statement 7b: Close constituents 7c: Cases study 7d: Strategy outline	7: Do we raise funds from the public? 8: Reasons for raising funds in the local community 9: My fears about fundraising
8		Setting the scene	None	10: Credibility file 11: Why we wouldn't take money 12: My reaction to the image
8		Raising money locally	8: Raising money locally	13: Finding out why people support us
9		Organising fundraising events	9: Organising an event	
10		Getting support from private companies	10: Company support	
11		Other kinds of support	None	

Week	DATES	Chapter title	Assignments	Email discussion points
11		Income generation	None	
11		Using the internet	None	
12		Developing a fundraising strategy	11: Developing a fundraising strategy	
12		Communications	None	
13		Managing your donors	12: Writing an application letter	
14		Preparing for the workshop	Review assignments: 3, 4, 6 and 11. Prepare outline and logical framework for proposed project	14: Suggested topics for the workshop
15		WORKSHOP		
16-20		All relevant chapters	Project work	

Week	Chapter title	Learning objectives
1	Introduction to fundraising	<ul style="list-style-type: none"> • N/A
1	Institutional fundraising	<ul style="list-style-type: none"> • N/A
1	Understanding your organisation	<ul style="list-style-type: none"> • define your organisation's mission and goals; • describe the developmental stage of your organisation.
2	Understanding your funder	<ul style="list-style-type: none"> • distinguish between the three sources of funding; • describe the four motives of giving; • decide which funders are the most appropriate one for your organisation; • develop a record keeping system to keep track of your contacts with funders
3	Making the approach	<ul style="list-style-type: none"> • describe the four stages of approaching a funder; • describe what you should do at each stage and know when each stage has been completed; • describe how to overcome blockages at each stage; • prepare a case for support.
4	Writing project proposals	<ul style="list-style-type: none"> • write a project proposal; • produce elements of a logical framework for your project; • describe to prepare a detailed description of your project; • describe how to prepare a project budget.
5	Managing relations with funders	<ul style="list-style-type: none"> • manage negotiations with funders; • follow the proper procedures for applying; • develop relationships with funders; • develop your role as fundraiser.
6	Planning your fundraising	<ul style="list-style-type: none"> • describe different types of core costs; • define what core costs are; • assess funder attitudes to core costs; • prepare a plan for core funding; • decide how to extend the life of funders; • plan your workload; • develop successful fundraising strategies;

Week	Chapter title	Learning objectives
		<ul style="list-style-type: none"> • manage and care for yourself.
7	Public fundraising	<ul style="list-style-type: none"> • N/A
7	Getting started	<ul style="list-style-type: none"> • describe why fundraising is important for your organisation; • describe the skills needed for fundraising; • define a fundraising mission statement; • define and manage your fears about fundraising; • define the case for involving your constituency of supporters; • produce the outlines of a fundraising strategy
8	Setting the scene	<ul style="list-style-type: none"> • establish the legal and tax constraints to fundraising; • find out what others are doing in fundraising; • gather relevant information about fundraising; • make contact with relevant networks. • draw upon existing experience in your organisation; • explain who you will take money from and why; • decide to whom you will be accountable; • establish how to maintain the dignity of those you serve.
8	Raising money locally	<ul style="list-style-type: none"> • identify potential donors to your cause; • describe why people give and the ways they give; • ask people to give to your cause; • establish a donor mailing list; • make contact with your community; • organise house-to-house collections.
9	Organising fundraising events	<ul style="list-style-type: none"> • describe types of fundraising events; • decide on the most appropriate event to organise; • describe how the event should be organised and managed.
10	Getting support from private companies	<ul style="list-style-type: none"> • describe why companies give; • describe ways in which they can support your work • approach companies to support your work
11	Other kinds of support	<ul style="list-style-type: none"> • describe ways in which volunteers, tourism, and diaspora communities can support your work.

Week	Chapter title	Learning objectives
11	Income generation	<ul style="list-style-type: none"> • describe ways of selling your expertise to raise income; • estimate the cost of selling services and publications; • describe ways of selling products to raise income.
11	Using the internet	<ul style="list-style-type: none"> • N/A
12	Developing a fundraising strategy	<ul style="list-style-type: none"> • produce a fundraising strategy specifically designed for your organisation in its present circumstances.
12	Communications	<ul style="list-style-type: none"> • describe how to get publicity for your organisation; • describe your organisation effectively in publicity materials; • produce promotional materials.
13	Managing your donors	<ul style="list-style-type: none"> • write an effective fundraising letter to a donor; • describe the principles of maintaining relationship with donors.
14	Preparing for the workshop	<ul style="list-style-type: none"> • During the workshop we will: • address those issues that you have found difficult so far; • practice producing a logical framework analysis; • practice producing a budget; • discuss with you a small project that you will be completing during the third phase of the project.
15	WORKSHOP	<ul style="list-style-type: none"> • N/A
16-20	All relevant chapters	<ul style="list-style-type: none"> • N/A

Workshop evaluation

Please take a few minutes to complete this short evaluation questionnaire. Thank you.

1. To what extent did this workshop meet with your expectations?

FULLY / PARTIALLY/ NOT AT ALL

2. What aspects of the workshop did you most benefited from? (Please explain why)

3. What aspects of the workshop did you least benefited from? (Please explain why)

4. If we were to run further workshops of this nature, what changes would you recommend that we make?

5. What would you like guidance with most in the post workshop period?

6. Please provide any other comments.